

the 1981
White House
Conference
on
Aging

Executive Summary of
Technical Committee
on the

PHYSICAL & SOCIAL ENVIRONMENT AND
QUALITY OF LIFE

NOTE: The recommendations of this document are not recommendations of the 1981 White House Conference on Aging, or the Department of Health and Human Services. This document was prepared for the consideration of the Conference delegates. The delegates will develop their recommendations through the processes of their national meeting in late 1981.

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I. INTRODUCTION

Quality of life represents the intertwining of the physical, intellectual, social, emotional and spiritual well-being of an individual. It means having choices and the freedom to act upon them. Quality of life includes basic economic security, physical and mental well-being, and opportunity to preserve one's ethnic, cultural, and community heritage. It means having access to the living arrangements, the activities, and the services appropriate to one's needs and interests.

Quality of life presupposes satisfaction of a person's basic physical needs. A person who must struggle for adequate food, shelter, or the means to preserve health has no "quality". Neither does a person limited by the racial, ethnic, religious, or sex prejudices of others. Quality of life includes freedom from undue fear and stress.

Quality of life includes also independence and interdependence, preserving dignity and feelings of self worth. For older people, that means living in a society that sees them as full citizens, with both rights and responsibilities. Quality of life is their yardstick for living and for life satisfaction.

Quality of life rests on principles, values, and attitudes. However, problems of quality and their potential solutions are quite concrete. In investigating the quality of life of the elderly in this country, this Committee explored six critical areas--housing, transportation, crime, legal services, arts and humanities, and creative use of time.

Each area was explored to determine the quality of services currently provided; the access to and availability of those services; the equity in obtaining those services; linkages with related programs; and the extent of participation by the elderly in both service planning and implementation.

As a result of this exploration, four threshold recommendations emerged:

1. The President should issue an executive order, to be followed by appropriate Congressional action, mandating a Quality of Life for the Elderly Impact Statement. This statement will require all Federal agencies to assess the impact of major policy, regulatory, and funding decisions on the quality of life of the elderly. In assessing this impact, planning and programs for economic security, physical and mental health, education, housing, transportation, crime, arts and humanities, legal services and the creative use of time shall be included, with special emphasis on the coordination and interrelationship among these elements. Similar requirements by state and local governments should be adopted.
2. Federal, state, and local governments, in making and implementing policy, regulatory, and funding decisions affecting the quality of life of the elderly, should give priority consideration to the interrelationship and the need for coordination among programs and provisions for economic security, physical and mental health, education, housing, transportation, crime, arts and humanities, legal services, and creative use of time. The major concern shall be with the total well-being of the older person. Responsibility for assuring this coordination should be clearly designated within each level of government.
3. The Age Discrimination Act of 1973 and its implementing regulations must be strictly enforced at national, state and local levels, in both public and private enterprise, throughout all societal institutions. The rights provided and remedies available under this statute and regulations should be publicized.
4. The private sector, particularly those businesses and organizations involved in housing, mortgage lending, and the media, should be made aware of and take into consideration the special needs of older people. Awareness should be fostered and promoted by all advocates of well-being for the upper age groups and should be incorporated into policies and practices of corporations and private-sector organizations at every level.

II. HOUSING

A. Findings and Issues

"Older people of our nation are entitled to suitable housing independently selected, designed and located with reference to their special needs, and available at cost they can afford." This quotation from the Older Americans Act of 1965 aptly summarizes the housing needs of our nation's elderly.

Most observers agree that, since 1965, progress has been made in achieving those goals. In recent years, several programs have been implemented specifically for the benefit of older

citizens, e.g., congregate housing services, weatherization, increases in federal housing subsidies, and improvements in housing design and related services to facilitate independent living.

One critical need that remains unmet, however, is expanded supply. It is currently estimated that some 200,000 new units per year are needed to house the increasing number of elderly. Further, more units that ever must be targeted to non-metropolitan locations, including rural areas, as recent data show that such areas are experiencing rapid growth in the absolute numbers of elderly households. Needs in the inner city continue to be critical and must be addressed. The magnitude of funds required to accomplish these production goals, coupled with current budgetary constraints at all levels of government, emphasize the need to encourage housing revitalization and preservation--a need highlighted by the fact that some two-thirds of the nation's elderly live in their own homes. Income constraints, however, often prevent these homeowners from initiating necessary renovation work and meeting the rising expenses of home ownership, including energy costs and property taxes. Financial assistance must be provided to enable the elderly to maintain and retain their own homes.

For many older citizens, however, independent living is not an option. In such circumstance, it is important that choices exist which meet the particular needs of the individual. This means that funding and facilities must be available for foster homes, congregate living projects, and intermediate and skilled care nursing centers. Assistance should also be provided to families who have assumed the total care of elderly persons.

B. Recommendations

1. The President and the congress should declare a national goal of providing each year a minimum of 200,000 units of housing for the elderly, distributed as needed between metropolitan and non-metropolitan areas. To achieve this goal:
 - a. The Department of Housing and Urban development, the Farmers Home Administration, the Department of Energy and other relevant executive departments should continue and increase their efforts--through such means as demonstration programs and technical assistance--to find ways of reducing the costs of producing and maintaining decent, safe and sanitary housing.
 - b. Funding for the supply of new and rehabilitated housing serving the elderly should be maximized; set-asides of funds for general housing assistance programs should be reserved specifically for the needs of the elderly.

c. The Congress and relevant executive agencies should amend existing statutes and regulations to facilitate housing production for the elderly:

-- administering Section 202 of the National Housing Act of 1959 to permit limited-profit sponsors to act as developers.

-- providing greater flexibility for pension fund investment in housing development.

2. Government at every level should conduct a top-to-bottom review of all housing programs that serve the elderly to ensure that special needs are addressed. For example:

a. Federal housing programs serving the elderly should provide subsidies or allow higher mortgage limits to accommodate special design features which increase safety, facilitate independent living and conserve energy:

b. To the greatest extent possible, housing programs should encourage the inclusion of health and social services facilities within or in close proximity to the housing.

c. Site selection criteria should be reviewed to ensure that housing facilities are located in safe areas which provide access to adequate transportation, parking, health and social services, and shopping, recreational cultural and leisure time opportunities.

d. State and local legislatures should provide maximum property tax exemptions for housing for the elderly that offer protective services for residents.

e. The Congress should enact legislation to require states to establish adequate administrative structures through which the planning and funding sources for housing and housing-related services can be coordinated. For example, a single application form, to be completed at the local level, should be designed to meet all requirements for the approval of funds under various programs administered by HUD, FmHA and HHS.

Alternatively, communities could be required to submit a revised Housing Assistance Program (HAP) plan that would fulfill the planning requirements for Title XX of the Social Security Act, Title III of the Older Americans Act, and various HUD programs, which would be submitted to a single Federal agency. That agency would have responsibility for processing acceptable proposals through the Federal bureaucracy.

The funds would then flow to the local applicant community for physical housing construction and maintenance programs and for accompanying social service programs identified in the single-application plan.

3. Government at every level should seek to provide assistance to elderly homeowners to enable them to maintain and retain their homes. For example:
 - a. The congress should amend Section 8 of the United States Housing Act of 1937 to make eligible for assistance elderly homeowners whose housing costs exceed 25 percent of the adjusted family income.
 - b. The Congress and state legislatures should develop new and increased funding for existing programs which assist homeowners in meeting rising energy costs and for making needed repairs and improvements.
 - c. State and local governments should be encouraged to provide "circuit breaker" tax relief; financial institutions should be encouraged to offer Life Tenancy Reverse Annuity Mortgages or other innovative financing alternatives.
4. To the greatest extent possible, the elderly should be provided choices where to live, allowing those who wish to remain in their neighborhoods to do so. This applies especially to elderly members of minority groups who wish to remain in ethnic neighborhoods, on reservations, or close to family members.
5. Programs under the Older Americans Act and Title XX of the Social Security Act should be encouraged to assist families in providing housing for older members in the families' homes. Such programs should include financial aid for low-income families and property tax exemptions and respite care for all families, particularly when the elderly are frail and require continuous care and supervision.

III. TRANSPORTATION

A. Findings and Issues

For the elderly, a lack of adequate public and private transportation means a denial of access to goods and services both needed and desired. It can mean, for some, isolation from daily social and economic activity.

Over the past decade, this concern has led to substantial improvements in existing facilities, initiation of new services,

and major legislative changes--all specifically designed to meet the needs for both greater mobility and better accessibility. In fiscal year 1979, for instance, it was estimated that at least \$820 million was expended in transportation services for the elderly. Most of the funds were provided for conventional public transit and the remainder for special systems, typically in the form of dial-a-ride or demand-responsive systems; taxi systems, usually operating with some form of reduced or subsidized rates; and a range of volunteer-based programs, often operated by private, nonprofit providers.

The most significant legislative achievements have been passage of Section 16 of the Urban Mass Transportation Act of 1970 and enactment of Section 504 of the Rehabilitation Act of 1973. The former requires that "special efforts" be made to assure that the elderly and handicapped have the same rights and access to Federally-funded mass transit facilities as other individuals; the latter prohibits discrimination against the elderly and the handicapped with regard to transportation services receiving Federal assistance.

As the decade of the eighties begins, new issues have arisen. Foremost, inflation and rising energy costs have made purchase and maintenance of equipment and services increasingly difficult. Only greater funding and more efficient use of resources will prevent deterioration in service delivery.

Inflation has impacted heavily on the ability of the elderly to afford rapidly rising fares, despite U.S. Department of Transportation mandates requiring half-price fares for the elderly during off-peak hours on federally-financed transit systems. Further, as more elderly men and women remain in the labor force for longer periods, the demand for mobility to and from the workplace will increase. In addition, as the non-metropolitan elderly population rises, increased funding as well as improved planning will be required to meet transportation needs in non-metropolitan areas. Lack of funds also prevents the hiring of sufficient, skilled personnel to supervise programs and operate equipment. Service providers have identified a number of problems with vehicle design and maintenance. The primary vehicle type is the van (mini-bus), modified to provide accessibility. It is generally agreed that the van is not strong enough to withstand rigorous daily use.

Lastly, little care has been directed to the needs and concerns of the elderly as pedestrians and as drivers. Road markings and street signs are often difficult to read; the renewal of drivers' licenses is often based on age rather than on ability to drive.

B. Recommendations

1. The President and the Congress should declare a national goal of providing adequate, accessible and affordable

transportation services for all elderly citizens. To achieve this goal:

- a. The Congress should appropriate maximum funds under the relevant portions of the Urban Mass Transportation Act, the Older Americans Act, the Social Security Act and the Surface Transportation Act.
 - b. Area planning agencies and organizations should be encouraged to consider transportation services as a priority funding category.
 - c. Applicable laws and regulations should be revised and amended, where appropriate, to increase flexibility in the use of transportation funds at the state and local levels to accommodate varying needs and situations. Such accommodation may involve increased use of demand-responsive systems, better coordination between public transportation and demand-responsive systems or more intensive upgrading of public systems.
 - d. Final regulations by the U.S. Department of Transportation implementing Section 504 of the Rehabilitation Act of 1973 should allow the opportunity for local flexibility in meeting statutory requirements.
 - e. Localities should be encouraged to offer greater fare relief for the elderly than is currently mandated by the Urban Mass Transportation Act.
2. The congress and state legislatures should act to improve the design and delivery of transportation services for the elderly. For example:
- a. The Urban Mass Transportation Administration should monitor more closely and continuously, compliance with Section 16 of the 1970 Urban Mass Transportation Act.
 - b. The U.S. Department of Transportation should develop standardized van specifications and improved design criteria.
 - c. The Administration on Aging, in conjunction with the Department of Transportation, should provide training programs and technical assistance for Area Agencies and their associated providers which emphasize the key elements of planning and operating transportation services for the elderly. Special priority should be given to rural transportation needs, as well as to providers which serve non-English-speaking elderly and the physically impaired.
 - d. The Administration on Aging, the U.S. Department of Transportation and HHS program officials for Social

Security Act Title XX should jointly develop a single uniform reporting form covering the information required by all agencies providing transportation services. Any additional information that is uniquely required by an agency could then be covered in a supplemental attachment to the main form.

3. Volunteer services to provide needed transportation for the elderly should be encouraged. For example:
 - a. The Congress should amend the Internal Revenue Code to permit mileage deductions for such volunteers, to be equivalent to mileage deductions for business travel.
 - b. State insurance commissioners, working with the insurance industry, should facilitate insurance coverage for volunteer drivers.
4. State motor vehicle departments should base drivers' license renewals for the elderly on ability to drive, not upon age.
5. State and local laws affecting pedestrian safety should be more vigorously enforced. Street and road markings should be employed to facilitate the needs of the elderly pedestrian and driver.
6. Vehicle drivers must be trained to sensitize them to the elderly with special needs. Those with special needs include persons who are physically impaired and those of minority language groups who may have difficulty with English oral or written directions.

IV. CRIME AGAINST THE ELDERLY

A. Findings and Issues

Approximately one million elderly were victimized by crime during the year 1980. Given their particular vulnerability, the elderly are unusually susceptible to becoming victims for criminals, particularly for such crimes as purse snatching, pick-pocket robbery, fraud and confidence games.

Since 14 percent of the elderly are home bound, they are also frequent targets of residential burglary. Long-term care and other institutional facilities give rise to both physical abuse and exploitation.

For many elderly, fear of crime can be as terrifying as the act of crime itself. This fear on the part of the elderly can become obsessive and result in self-isolation or in changing

- one's pattern of living to minimize the risk of victimization.

Crime control is primarily a local responsibility. While state and national governments can offer some assistance--financing, leadership, manpower--to reduce and curb crime, local officials, schools, churches, families, and private individuals must activate specific anti-crime strategies. These can range from self-help programs where the elderly themselves are trained in crime prevention procedures to special police patrols at buildings and sites frequented by the elderly. Security devices installed in housing for the elderly can make their residences safer.

B. Recommendations

1. Local governments must initiate and implement anti-crime strategies to increase the safety of all citizens, regardless of age. Federal, state and local governments should provide assistance where appropriate. Examples of such strategies include:
 - a. Local community programs incorporating the concepts of "neighborhood watch", property identification, special police patrols and media campaigns.
 - b. Promotion of working relationships between police boards and precincts and community groups serving the elderly.
2. Local and regional area aging agencies, in cooperation with police departments, should establish information programs to increase understanding of the crime problems faced by the elderly and describe actions that can be undertaken to mitigate them. For example, the elderly should be taught how to avoid street crimes, burglar-proof their homes, and be sensitive to fraud and bunco schemes. Also, educational programs should be developed to sensitize judges, prosecutors, probation and parole officers, local police and other law enforcement officers to the needs, concerns and feelings of older persons.
3. States should be encouraged to provide assistance and compensation to crime victims.
4. Increased emphasis should be directed to the Ombudsman program in long-term care facilities authorized by the Older Americans Act.
5. State and local agencies should be encouraged to collect detailed and uniform crime statistics that include victim age, locations of crime, time committed, and frequency of that crime, with reference to the national Senior Citizens Crime Index.

6. Needs assessments, required for funding of programs under the Older Americans Act, should mandate information on crime and programs of prevention.

V. LEGAL SERVICES

A. Findings and Issues

The term "equal justice" under law applies to all citizens, regardless of age. For the elderly, legal services take on an added dimension for it is a primary vehicle by which the equitable and efficient delivery of services is ensured. Consequently, legal services can be considered a gateway to improving quality of life.

The legal needs of the elderly are diverse. They range from simple probate proceedings, to dealing with government agencies regarding benefits, to issues involving discrimination under the Age Discrimination Act of 1975.

Legal services are made available to older Americans from three principal sources: the private bar, the Legal Services Corporation (LSC), and the Administration on Aging (AoA).

The number of elderly receiving legal assistance today is at least twice that of only three years ago. Numerous state bar associations have launched programs specifically designed to address the legal needs of older persons; the AoA and the LSC have entered into a cooperative agreement to increase the quality and scope of legal services available to the elderly.

Despite this very positive trend, less than 10 percent of the legal needs of our country's 25 million elderly are being met. The reasons for this fall into two categories: First, there are an inadequate number of attorneys accessible to meet the legal service needs of the elderly. Because the organized private bar is still the core of the American legal system (only a small fraction of the 530,000 practicing attorneys in the United States work for public legal service programs), more of its resources need to be tapped on behalf of the elderly.

Second, the elderly themselves are frequently fearful of a system they do not understand and often cannot afford. Further, after initial contact with an attorney, the older person may find himself in a system that is complex, confusing and fraught with delay. Sometimes physical access is the greatest impediment. This can be especially true for those confined to long-term care institutions.

B. Recommendations

1. The Legal Services Corporation Act and the Older Americans

Act should be reauthorized in 1981. Strong advocacy support should be brought to bear. In connection with the authorization of these statutes:

- a. Title III of the Older Americans Act should be amended to define legal services as a mandated priority in the provision of social services.
 - b. A mechanism for assessing the adequacy of services for the elderly provided by the Legal Services Corporation should be authorized.
 - c. Through these statutes and other means, efforts should be undertaken to educate the elderly as to when legal services are appropriate and where such services can be obtained.
2. Legal services must be provided for the elderly, delivered at an affordable price, meeting high standards of quality, and representing diversified services from both private and public bars.
- a. Additional funding should be earmarked for this purpose by the LSC and the AoA.
 - b. Federal, state and local bar associations should be encouraged to expand their emphasis on pro-bono activities, ensuring that the special needs of the low-income elderly are addressed.
 - c. Other means of providing services to elderly citizens unable to afford counsel should be explored, such as privately or partially-subsidized insurance plans, appropriate use of qualified lay advocates and law school students. Attorneys and lay advocates providing legal services for the elderly must be properly trained and sensitized to the needs of older persons, particularly those of low income and minority groups.
3. The study initiated by the Federal Trade Commission focusing on the impediments to the provision of affordable legal services to the elderly and others should be expeditiously completed and its recommendations implemented.
4. An evaluation (conducted by the Department of Justice, the Federal Judicial Center, the American Bar Association or a private foundation) should be conducted to determine the extent to which the structure and operation of this country's court systems adequately serve older Americans. Such matters as accelerated docketing when the elderly are involved, probate and small claims procedures, and guardianship should be among the subjects examined. Mechanisms for dispute resolution outside of court--already being used successfully in certain areas--should also be considered.

5. States should be encouraged to provide free guardianship services for the elderly who cannot otherwise afford to be cognizant of their need for legal representation. The effectiveness of these guardianship laws should be monitored by either the states or local bar associations.
6. The laws governing divorce should be revised to consider visitation rights of grandparents and great-grandparents.

VI. ARTS AND HUMANITIES

A. Findings and Issues

There is now a general consensus that arts and humanities are integral to the quality of life for all ages. Arts and humanities not only provide recreation, but also play a significant role in the physical, emotional and mental well-being of older Americans. They function as therapeutic and rehabilitative mechanisms and play a role in prolonging life. They offer employment and volunteer options, new learning experiences and the opportunity to open new avenues for personal growth and self-expression. They also reinforce cultural and local heritage.

B. Recommendations

1. The Older Americans Act of 1965 must be amended to:
 - a. Clarify that funding of arts and cultural services is permissible as a social service under Title III.
 - b. Authorize demonstration projects to be carried out by the Administration on Aging which test innovative approaches to the enhancement of the quality of life through arts and humanities.
2. Funding should be increased for the employment of older adults in cultural activities under the Comprehensive Employment and Training Act and Title V of the Older Americans Act.
3. In order to improve both access to and quality of service for the elderly, cultural services should be integrated into the social service network. Private sector support also should be solicited to create additional cultural services and to provide employment opportunities for elderly artists, actors and writers. Cultural institutions should be urged to include both frail and independent older persons in arts programs and services. Oral histories stressing local and cultural heritage should

be encouraged.

4. More older professional artists should be used in programs such as the Arts in the Schools Program of the Department of Education.
5. Research should be funded to measure the impact that cultural activities have on the physical and mental well-being of older persons and their role in prolonging life.

VII. CREATIVE USE OF TIME

A. Findings and Issues

The self-image of an older person in retirement often depends on opportunities to maintain health and economic security and to find meaningful experiences in new-found leisure time. Quality of life may well depend upon quality of leisure.

For many retirees, easing into a leisure-filled lifestyle is not a simple matter. The role change can be difficult, perhaps traumatic. Increasingly, research indicates that those who plan ahead for retirement experience a more satisfactory transition than those who do not; as a result pre-retirement education programs have become viewed as essential to preparing individuals for retirement. Neither the public nor private sector, however, has assumed responsibility for this type of education, despite the increasing focus on this need.

Moreover, access to recreation activities is not always available. One is often excluded by both attitudinal and architectural barriers. Both types of impediments must be eliminated.

Although recreation needs may differ by individual, certain common benefits are obtained from them by all participants. They include the opportunity to learn new skills, provide peer group relationships, assist in maintaining physical and mental health, and increase cultural enrichment.

It is important to note that leisure activities should not be restricted to only those elderly who are capable of independent living. Programs should also be provided in institutional and long-term care settings, with adjustments to accommodate the physical limitations of the individual.

B. Recommendations

1. The Administration on Aging should encourage pre-retirement planning and education in order to impart the attitudes, skills, and knowledge necessary to ensure the successful transition to retirement life. These efforts should be complemented by the private sector.

2. Congress should appropriate funds under the Older Americans Act, Title XX and other relevant authorities for recreation and education programs that affect the well-being of the elderly.
3. Federal funding should be provided for recreation and education services in conjunction with nutrition programs for the elderly under the Older Americans Act.
4. Library services should be made more accessible to the elderly. Special large-print books should be made available and programs tailored to topics of interest to the elderly should be offered. Transportation to and from libraries should be provided. For the homebound, special distribution services (such as bookmobiles) should be available.
5. Educational institutions with programs to train those who work with the elderly should consider in their curricula the needs of older persons for continued education and recreational activities and opportunities. Funding for such programs should be the responsibility of government at the national, state and local levels.
6. A joint Federal effort involving the Department of Health and Human Services, the Department of Education, the Department of the Interior, the National Recreation and Park Association, the National Council on Aging and the Presidents Council on Physical Fitness should encourage the establishment of physical fitness programs for the elderly, and establish standards and guidelines for recreational programs.
7. Programs in institutional and long-term care settings should be similar, as much as possible, to those operated for people outside institutions. Particularly in settings where people stay for a long time, contact with the outside community becomes important and, wherever possible, volunteers from the community should be recruited to assist professional staff.

The following Technical Committee Summaries have been published:

Retirement Income

Health Maintenance and Health Promotion

Health Services

Social and Health Aspects of Long Term Care

Family, Social Services and Other Support Systems

The Physical and Social Environment and Quality of Life

Older Americans as A Growing National Resource

Employment

Creating an Age Integrated Society: Implications for Societal Institutions

Creating an Age Integrated Society: Implications for the Economy

Creating an Age Integrated Society: Implications for the Educational Systems

Creating an Age Integrated Society: Implications for Spiritual Well-Being

Creating an Age Integrated Society: Implications for the Family

Creating an Age Integrated Society: Implications for the Media

Creating an Age Integrated Society: Implications for Governmental Structures

Research in Aging

Experts from various fields were appointed by the Secretary of Health and Human Services to serve on 16 Technical Committees, each charged with developing issues and recommendations in a particular area for consideration as background material for the delegates to the 1981 White House Conference on Aging.